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United States  
Department of  
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Foreign  
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Service

# Foreign Agriculture Circular

## Coffee

### World Coffee Situation

FCOF 2-85

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#### WORLD COFFEE SITUATION

#### SUMMARY AND OUTLOOK

The first USDA projection of 1985/86 world coffee production, based on conditions to about mid-June, is 99.1 million bags (60 kilograms each), up 7.2 million from the revised estimate of 1984/85 outturn. Exportable production--which represents total harvested production less domestic consumption in producing countries--is projected at 76.6 million bags. The 1984/85 estimate is 70.6 million bags. Among the major suppliers, improved prospects in Brazil, Ethiopia, Ivory Coast, Kenya, and Indonesia more than offset reduced prospects for Costa Rica and India.

World coffee exports, including the green bean equivalent of roast/ground and soluble, should total about 70.2 million bags during crop year 1985/86, 600,000 bags or 1 percent below the estimate for 1984/85. Exporting members of the International Coffee Organization (ICO) will account for over 99 percent of total world exports in 1984/85 and importing members will take 86 percent of the imports. Many countries are exporting large quantities of coffee to ICO non-members. An agreement to suspend heavy discounts will reduce the flow of coffee to these countries.

Coffee prices for sales to member importing countries have remained surprisingly firm over the past year despite global export quotas intended to drive prices down to the mid-point of the ICO's \$1.20 to \$1.40 per pound inner-price band. The price strength was tied to various factors, including the late harvests in Africa and Latin America, quality problems--especially in Brazil--and a preference by many countries for shipping to non-members, despite the heavy discounts.

Carryover stocks at the end of marketing year 1985/86 are expected to equal 56 percent of annual world consumption for the year. The proportion of these stocks which may be of export quality has not been determined, but the matter of stock quality is being analyzed by the ICO so that eventually improved statistics may become available.

## OVERVIEW

### Exports

World coffee exports are expected to be down by 600,000 bags during crop year 1985/86 to 70.2 million bags. The breakdown in exports among members and non-members is projected as follows, in millions of bags, green bean equivalent (GBE).

|                  | Importers |                   |        |                   |                   |        |                  |                   |       |
|------------------|-----------|-------------------|--------|-------------------|-------------------|--------|------------------|-------------------|-------|
|                  | 1983/84   |                   |        | Estimated 1984/85 |                   |        | Forecast 1985/86 |                   |       |
|                  | Member:   | Non-<br>:Members: | Total: | Member:           | Non-<br>:Members: | Total: | Member:          | Non-<br>:Members: | Total |
| Exporters        | :         | :                 | :      | :                 | :                 | :      | :                | :                 | :     |
| Members.....     | 58.1      | 9.6               | 67.7   | 59.3              | 11.2              | 70.5   | 60.4             | 9.6               | 70.0  |
| Non-members..... | .3        | .1                | .4     | .2                | .1                | .3     | .1               | .1                | .2    |
| Total.....       | 58.4      | 9.7               | 68.1   | 59.5              | 11.3              | 70.8   | 60.5             | 9.7               | 70.2  |

Exports of coffee by members of the ICO during the October 1984/May 1985 period of coffee year 1984/85 totaled 45.3 million bags, compared with 45.0 million for a similar period in 1983/84. Exports to importing members totaled 37.7 million bags.

The volume of coffee to be shipped during the second half of the 1984/85 coffee year, 33.4 million bags, was without precedent. If the 31.9 million bags shipped during this period last year are added to the 26.8 million bags shipped during October-March 1984/85, exports by exporting members to members would total 58.7 million for the year. Exports to non-members for the first 8 months of the current coffee year amounted to 7.6 million bags, up 1.2 million from 1983/84.

### EXPORTS BY EXPORTING MEMBERS TO MEMBERS AND NON-MEMBERS (Million Bags)

| April to March          | Members | Non-Members | Total <u>1/</u> |
|-------------------------|---------|-------------|-----------------|
| 1979/80.....            | 54.9    | 5.9         | 60.8            |
| 1980/81.....            | 53.5    | 6.9         | 60.3            |
| 1981/82.....            | 53.6    | 7.9         | 61.5            |
| 1982/83.....            | 54.5    | 9.9         | 64.4            |
| 1983/84.....            | 56.4    | 10.4        | 66.8            |
| 1984/85 <u>2/</u> ..... | 58.7    | 11.0        | 69.8            |

1/ Totals may not add due to rounding. 2/ Preliminary.

Source: ICO document EB 2549/85 E, April 13, 1985.

The ICO's 15-day moving average indicator price fell below \$1.30 per pound on July 3rd, precipitating a 1-million-bag reduction in the organization's global export quota to 59 million. Two increases of 1-million-bags would be triggered if the indicator price recovers to \$1.40 or a decrease would occur if it falls to \$1.20. The ICO mechanism allows for another 1-million-bag cut if the 15-day price is still at or below \$1.20 on the fifteenth day after the first cut. However, the second cut could only take place before September 30 of this year, based on a special decision of the Executive Board, because only two quota withdrawals are permitted during any one quarter. The July 4 reduction was distributed among the larger ICO exporters, those with basic quotas in accordance with their shares of the group's initial overall quota.

### Consumption

After increasing by 1.0 million bags between crop years 1982/83 and 1983/84, coffee consumption in producing countries fell by 150,000 bags in 1984/85, but should go up again in 1985/86 by 1 million. An estimated 22.9 percent of the 1985/86 world coffee crop will be consumed in producing countries, down from 23.4 percent of the 1984/85 harvest.

Green coffee imports by importing members of the ICO are expected to total about 55 million bags during 1985, including 3 million bags from smaller producing members exempt from basic quotas and 52 million from ICO non-members.

#### IMPORTS OF GREEN COFFEE BY SELECTED CONSUMING COUNTRIES, 1983 AND 1984

| Country            | 1983           | 1984       | Percent Change |
|--------------------|----------------|------------|----------------|
|                    | -----bags----- |            |                |
| United States....: | 16,448,526     | 17,733,557 | +7.8           |
| West Germany.....: | 7,404,580      | 7,110,026  | -4.0           |
| France.....:       | 5,280,150      | 4,682,808  | -11.3          |
| Japan.....:        | 3,400,196      | 3,734,581  | +9.6           |
| Italy.....:        | 4,102,525      | 3,718,502  | -9.4           |
| Netherlands.....:  | 2,294,079      | 2,388,615  | +4.1           |
| United Kingdom...: | 1,565,830      | 1,825,878  | +16.6          |
| Sweden.....:       | 1,569,217      | 1,529,633  | -1.9           |
| Canada.....:       | 1,384,203      | 1,493,350  | +7.9           |
| Finland.....:      | 1,050,357      | 1,141,073  | +8.6           |
| Switzerland.....:  | 996,138        | 977,467    | -1.9           |
| Austria.....:      | 1,031,243      | 867,435    | -15.9          |
| Denmark.....:      | 818,648        | 762,133    | -6.9           |
| Norway.....:       | 686,340        | 678,677    | -1.1           |
| Total.....:        | 48,032,032     | 48,643,735 | +1.3           |

SOURCE: Official statistics and trade sources.

U.S. coffee imports rose about 7.8 percent during 1984. The figure is surprisingly high and may have been a function of an inventory buildup of both green coffee and finished products, the introduction of new brands and the extension of old brand lines, somewhat higher consumption by the food service industry and increased sales in other outlets, such as specialty shops and convenience stores.

European consumption held up well considering that coffee prices are quoted in dollars and that due to the strength of the dollar, retail prices paid by Europeans rose to record levels during 1984.

### Prices

Major consuming countries, for which coffee prices had been artificially high in view of a presumed world coffee surplus, opted for a quota system for coffee year 1984/85 (October-September), which would rapidly bring prices back into the middle range of the ICO's 20 cents-per-pound central price band set for 1983/84, i.e. about \$1.30 per pound. Rather than declining to \$1.30 per pound, the 15-day indicator price hovered between \$1.30 and \$1.35 from December 1984 through June 1985, apparently caught between two opposing forces. The lack of any definitive price movement was believed due to uncertainty over the fundamentals of supply and demand. Fears that the quota was excess to demand pressured the market in the direction of a cut, but this force was offset by the existence of inadequate supplies of quality coffee from several key origins. The distribution of quota among producer countries also was a bullish factor. At any given time, the countries with unshipped quotas were not necessarily those with exportable stocks.

Although marketing problems and actual shortages may exist for some countries, the 1984/85 supply should be large enough to dictate a 15-day moving average price between \$1.20 and \$1.30 per pound, after the 1-million-bag cut in the global quota to 59 million.

### Quality

While the quality of many countries' coffee crops in 1984/85 has been of concern, Brazil's was of special concern until new crop supplies began to arrive in late June. In order to increase export sales, the Brazilian Coffee Institute (IBC) at times over the past several months lowered its ex-dock New York selling price about 10 cents per pound. Individual roasters, which purchased a substantial part of their needs at the low prices, found the quality of coffee received was so poor that a few of the shipments were rejected. Some of these roasters turned to "Other Mild" producers for better quality beans to blend with their Brazilian acquisitions.

### Stocks

Many of the world's coffee traders believe there is a significant lack of export quality surpluses in all major producing countries except Colombia. They believe producing countries regularly inflate their stocks and production figures hoping to gain a larger export quota from the ICO. They have calculated that stocks may total less than 40 million bags on Oct. 1, 1985, rather than the 60 million projected by the ICO at that date.

## INTERNATIONAL COFFEE ORGANIZATION

The Council of the International Coffee Organization held its forty-third session in London April 15-19, 1985. Many of the talks focused on two interrelated problems: (1) the high rate of quota under-shipments and (2) the high level of exports to non-members at discounted prices.

### Undershipments

No clear resolution to the undershipment (unsold quota) problem resulted from the April 1985 meetings, in part because different perceptions of the meaning of quotas seems to exist between producers and consumers. Consumers believe producers have an obligation to ship approximately equal amounts of coffee each quarter while some producers appear to regard quotas as an entitlement to ship whenever they please between October and September. While consumers were generally of the opinion prices in quota markets were too high because some producers had undershipped in an effort to manipulate higher prices in quota markets, producers maintained the undershipments resulted because the global quota for the year was set unrealistically high. The attitude of the producers led the U.S. delegation at the April meeting to question the need for quarterly quotas which were originally established to smooth out the flow of coffee over the course of the coffee year, thereby minimizing market price fluctuations.

In a case-by-case analysis, the ICO Secretariat presented figures which showed that although many countries were substantially undershipped at the end of the first half of the quota year 1984/85, all countries with a basic quota actually had sufficient coffee available to meet their allocations. Producers generally tied their undershipments to late crops, especially in Central America and Africa, or to transport difficulties, port congestion, etc. Many consumers felt that at least in those countries with large verified stocks, late crops should not have affected the country's ability to meet its quota. This may not always be true as some buyers prefer new crop beans to old, especially when new crop quality is superior. The high rate of undershipments at a time of global surplus and record level total shipments of coffee can also be explained in part by the dislocation of stocks. Generally, countries with stocks had made good progress toward filling their quotas by March 31, 1985, and could have increased their export volume had they been authorized to do so. This assumes that stocks are of export quality, which may not always be the case. A working group has been set up to develop more accurate ways of determining both the quantity and quality of producer-held stocks.

### Non-Member Shipments

The growing volume of exports to non-members at substantially reduced prices, commonly referred to as the "two tier" market problem, was dealt with more successfully. While no specific volume limitations were set, the Council approved Resolution 336 requiring that producers bring the non-member sales prices up to the member price level and to limit exports to a quantity consistent with this price objective. Exporters were also required to report the amount of coffee sold to non-members for shipment up to Sept. 30, 1985,

indicating the intended destinations. Compliance with Resolution 336 will be monitored by a special ICO committee open to participation by all members of the Executive Board. It is impossible at this time to determine how effective the resolution will be in equalizing prices between members and non-members. Sales to non-members could decline, perhaps by 1 to 2 million bags, as a result of Resolution 336.

ICO producer members virtually halted coffee export sales to non-member countries following passage of Resolution 336. Members of the Coffee Exporters Association of Indonesia, one of the producing countries which voted in opposition to the resolution, asked that its government consider withdrawing from the Organization. However, this option has not been seriously considered. Leaving the ICO is not an attractive alternative since it is uncertain whether adequate non-member markets can be found. In general, it is the countries which have expanded coffee production over the past 10 years that are most unhappy with the resolution.

No decisions were taken on two other producer proposals on controls at the April meeting, one calling for the creation of a working group to examine the existence of fraud (forged stamps and certificates) and illegal diversions, and another clarifying the language of Resolution 329 concerning controls on exports to non-members.

#### Other Actions

At a future meeting the ICO will review how the composite indicator price is compiled. The basket of grades currently used to make up the index covers less than one quarter of the trading volume. Although acceptable net price data are now available, the index does not include sales transactions for the two largest producers, Brazil and Colombia. At the same time, the differential for the "Other Milds" and "Robustas", on which the indicator is based, has widened to about 20 cents per pound over the past 6 months. The differential between the higher priced Other Milds and the lower priced Robustas seems likely to grow.

#### Quotas

The global annual quota for coffee year 1984/85 was increased from 60,005,500 bags to 60,155,500 bags on March 26, 1985, to take account of the accession to the agreement of Cuba on Feb. 19, 1985, as a member exempt from a basic quota. On July 4 there was a 1-million-bag reduction in the quotas of exporting members entitled to a basic quotas. (Table 6)

Although quarterly quotas are often shown for members exempt from basic quotas and exporting less than 100,000 bags, these countries are not subject to quarterly quotas. The figures for these countries have been adjusted to correspond to the amount of coffee export stamps released to them in quarters October-December 1984 and January-March 1985. The balance of their annual quotas has been distributed in equal parts in the two remaining quarters of the coffee year.

## PRODUCTION AND TRADE IN SELECTED COUNTRIES

### North America, Central America and Caribbean

The area in coffee in Costa Rica is rising as a result of new plantings made possible with private financing as government funds for expansion are not available. However, 1985/86 production is expected to show a 470,000 bag cyclical decline following a record 1984/85 crop. Land suitable for coffee production is quite limited, unless coffee replaces sugar in the Central Valley area, which seems possible. In addition to the current ICO quota of about 1.22 million bags, Costa Rican exporters plan to place some 700,000 bags in non-member markets in 1985/86. This would leave stocks at an excessive 1.26 million bags on Sept. 30, 1986, up 20 percent from the preceding year. Stock levels are of great concern to the producers since storage costs are deducted in determining their final proceeds.

Output from the 1985/86 (July/June) coffee harvest in the Dominican Republic is expected to fall by 9 percent due, in part, to the doubling of fertilizer and pesticide prices over the past year. Since February 1985, as part of an International Monetary Fund (IMF) standby agreement, the Dominican Government has allowed U.S. dollar earnings from coffee (and other exports) to be exchanged at the free market or parallel rate. This more than doubled the peso earnings of coffee exporters. However, to offset a budgetary deficit, the government temporarily imposed a 36-percent tax surcharge against the earnings for selected agricultural export items, including coffee.

A combination of dry weather from November to May, followed by early showers in the highlands may be causing some losses to the 1985/86 (October/September) Guatemalan coffee crop. Guerrilla activities during 1984 were limited to plantations near the Mexican border and caused little damage. Guatemala was able to fill its ICO quota as well as ship record quantities to non-members during the first two quarters of the current ICO coffee year. Sales to ICO markets during the first 5 months of 1984/85 returned twice the dollar value of sales to non-ICO markets. However, it is still more attractive to sell to non-member markets, where returns can be exchanged at the parallel market rate of 2.50 quetzales per \$1 rather than at the 1:1 rate applied to quota market sales.

On May 31, the National Coffee Association of Guatemala (ANACAFE) advised Guatemalan exporters that it will issue permits for the shipment of non-quota coffee only to those members who have satisfied their ICO quota obligations, or who have deposited coffee equaling their remaining obligations in ANACAFE warehouses. Producers who deposit quota coffee in ANACAFE warehouses in order to get a shipping permit for non-quota coffee, are obligated to export that coffee before Aug. 30, 1985.

El Salvador could export as much as 2.8 million bags in 1985/86, about the same as in 1984/85, provided non-member sales can be held at the 300,000-bag level. By the end of March 1985, non-member purchases by Israel, Argentina, Bulgaria, Romania, and Jordan had reached only 56,000 bags. If El Salvador is unable to sell a fairly large volume of coffee in non-member markets, the country's already large 1.6-million-bag carryover stock could grow. The

Coffee Institute, INCAFE, recently announced that while exporters will still be required to sell through the Institute, they will be able to use their own brand names, which could earn them premiums based on their individual reputations.

Haiti currently has a 420,000-bag ICO quota. Meeting this commitment is the principal objective of the government's export agency OPRODEX. However, this goal has been difficult with coffee production falling to the 600,000-bag range or below and domestic consumption taking an estimated 240,000 to 250,000 bags.

A 2 year dry spell that ended late last year may have extended the flowering period for Hawaii's 1985/86 kona coffee crop, raising output to at least last year's 14,000-bag level. Last year's crop was down from the record 21,000-bag 1983/84 crop due to a combination of dry weather, volcanic fall out, and the alternate bearing nature of trees.

Over 38 percent of Honduras' exports in the first 6 1/2 months of 1984/85 went to ICO non-members. The large volume sold to the non-member sector reflects the need to expand exports to these markets in view of an ICO allocation significantly below the exportable surplus. According to ICO data physically verified in Honduras, stocks increased from 71,660 bags on Sept. 30, 1980, to 975,451 bags last September 30.

The 1985/86 Mexican coffee harvest (October/September) is forecast to be larger in volume and may be higher in quality than in 1984/85. Mexican coffee exports are expected to total about 2.93 million bags during coffee year 1984/85, including ICO non-members. Mexico is believed to have contracts for 1 million bags with non-members, including 600,000 bags which had already been shipped as of mid-May. INMECAFE officials indicate the government plans to honor the ICO's decision to discontinue discount sales to non-members. This may lead to a substantial drop in non-member sales during 1985-86.

Mexico began crop year 1984/85 with over 1 million bags of export quality coffee in stock. All of the non-export quality coffee is directed into the domestic market, which requires 1.7 to 1.8 million bags annually. At the beginning of March 1985, INMECAFE held about 40 percent of the 2.3 million bags available in the country, with the balance in the hands of the private sector, including producers and brokers. Mexico's coffee export fund and compensation program, which subsidizes exports to non-members at 30.38 cents per pound while taxing exports to member country markets at the rate of 20.26 cents per pound ( as of mid-May), will continue until all contracts signed with non-members prior to April 22 are filled.

### South America

Based on the field observations in April, which confirmed the effect of favorable rainfall, temperature patterns, and good tree management since last September, the 1985/86 (July/June) Brazilian coffee crop is estimated at 33 million bags, 22 percent larger than the 1984/85 harvest. A comparison of the 2 crop years, by states, is as follows in millions of 60 kilogram bags:

| <u>State</u>   | <u>1984/85</u> | <u>1985/86</u>   |
|----------------|----------------|------------------|
| Parana         | 5.5            | 4.5 - 5.0        |
| Sao Paulo      | 7.5            | 9.5 - 10.0       |
| Minas Gerais   | 7.5            | 10.5 - 11.0      |
| Espirito Santo | 4.0            | 5.0              |
| Other States   | <u>2.5</u>     | <u>2.5 - 3.0</u> |
| Total          | 27.0           | 32.0 - 34.0      |

Exportable production in 1985/86 is estimated at 24.0 million bags, compared with 18.5 million bags in 1984/85. Adverse weather conditions seriously affected cup quality last year. Cup quality is determined by weather, especially air moisture, after the bean has reached the ripe cherry stage. The dryer the air, the less the fermentation and thus, a better cup quality coffee. While weather conditions during the final stages of bean development may reduce cup quality, it does not make it unexportable. Nor is quality related to the term exportable as used in this report, as this refers to the quantity of coffee available for export after domestic needs are met.

On the basis of data obtained from growers' cooperatives, exporters, and field observations, Brazil's area and tree population are estimated as follows in millions of trees and thousands of hectares:

BRAZIL: COFFEE AREA AND TREE  
NUMBERS, 1983/84-1985/86

|                   | <u>1983/84</u> | <u>1984/85</u> | <u>1985/86</u> |
|-------------------|----------------|----------------|----------------|
| Bearing trees     | 3,400          | 3,450          | 3,500          |
| Non-bearing       | 300            | 325            | 300            |
| TOTAL             | <u>3,700</u>   | <u>3,775</u>   | <u>3,800</u>   |
| Area Planted (Ha) | 3,225          | 3,275          | 3,300          |

Subsidized credit currently is not available for the expansion of coffee to new areas. However, attractive support and market prices, even for inferior quality coffee, has created a demand for privately financed coffee seedlings in Sao Paulo, Minas Gerais, and other more northerly, frost-free states. The Brazilian Coffee Institute (IBC) support price to growers is currently 360,000 cruzeiros per bag (about \$72 at the April 1985 exchange rate) with quarterly adjustments. Actual growers' prices range between 430,000 and 550,000 cruzeiros per bag.

According to preliminary data, Brazil's exports of coffee will total 19.0 million bags GBE for the 12 months ending June 30, 1986, including about 2 million bags to non-members. In order to avoid a sizable shortfall in its sales to ICO markets and to increase sales to non-ICO countries, the IBC has, at times over the past year, offered substantial price discounts. However, as of April 24, the minimum export price has been the same for all countries, ICO members or non-members, according to the IBC.

Carryover stocks in Brazil as of June 30, 1985, not including any new crop coffee which may already have been harvested, are estimated at 7.7 million bags. Some 4 to 5 million bags were held by the IBC. Brazil's large 1985/86 crop can be expected to pull stocks above critical levels to about 12.7 million bags on June 30, 1986.

Coffee production is forecast to decline slightly in Colombia during 1985/86, due to the acreage which has been pruned over the past 2 years as an interim measure to curb output.

Official coffee exports from Oct. 1, 1984, through April 13, 1985, were up 4 percent over a similar period last year. Sales to the United States exceeded 1.3 million bags, establishing it as the second leading market behind West Germany. Sales to non-ICO markets for the same 6 month period were up 7 percent at 410,297 bags. Colombia is attempting to expand non-ICO sales through barter agreements with East European countries. About 55 percent of total coffee exports are by the Coffee Growers Federation (CGF) with the balance handled by private exporters. The CGF will try looking after the export interests of 53 grower cooperatives who plan to began export operations in the near future.

Before an export authorization for a 70-kilogram-bag of green coffee can be issued, the exporter must deliver 61.2 kilograms of excelsa (export quality parchment) to the National Coffee Fund. He must also have deposited \$206 with the National Bank and paid a \$13.39 ad valorem export tax. Coffee exporters complain that nearly all other export commodities are encouraged through tax rebates.

Colombian coffee stocks continue to accumulate at a rate in excess of 1 million bags per year, and year-end stocks already exceed annual production. Because Colombia now holds the world's largest stock of coffee, it would like to see the ICO allocate quotas based on stocks as well as production (as set forth in Article 35 of the 1983 International Coffee Agreement). Carrying such a large volume of stocks is a heavy financial burden, and it is difficult to maintain the quality of stored coffee, which may lose cup quality due to oxidation, especially in areas of high relative humidity. To some extent, stocks are now being moved to the drier areas near seaports or to the highlands, where it is easier to maintain quality.

Most of the increase in Ecuador's 1985/86 crop will come from the Arabica plantations which have gradually recovered from the "El Nino" floods that slashed 1983/84 production severely. The Arabica and Robusta beans harvested so far this year have graded better than last year, when pre-harvest rains and high humidity caused mold damage. The proportion of washed coffee entering the market this year is up as producers are responding to price incentives for coffee processed in this manner. Total Ecuadorian exports in 1985/86 are projected at about 1.5 million bags, including 300,000 bags to non-members. Despite trade criticism, the Government of Ecuador will enforce the ICO's decision not to allow lower price shipments to non-member countries. Prior to this decision, the Central Bank accepted discounts of up to 40 percent in the registration price of exports to non-members.

Peru's 1985/86 (April/March) coffee harvest should reach a record 1.3 million bags, up substantially from the 1984/85 harvest. This year's crop has been favored with adequate and timely rains, and strong coffee prices have encouraged all farmers to use more fertilizer and take better care of their trees. Lost production from up to 10,000 hectares of coffee trees abandoned in the Ayacucho area over the past 4 to 5 years, because of terrorist activity, have been offset by a 6-year, \$40-million World Bank project for rural development, which includes the addition of new coffee plantations in other parts of the country and renovation and repopulation of existing areas. Coffee consumption has declined in Peru over the past several years, due to high domestic prices and reduced consumer purchasing power. The decline has probably been offset by larger shipments to non-ICO countries; however, these were temporarily suspended in April, until the effect of the ICO's efforts to equalize the sales prices for non-member countries with those for member country-markets becomes clearer. However, if sales to non-member markets cannot be increased, there will be a significant rise in Peru's stocks by March 31, 1986.

### Africa

Between Oct. 1, 1984, and March 31, 1985, Cameroon exported only about 42 percent of its annual quota to ICO markets. Cameroon should be able meet its 1.5-million-bag ICO export quota for 1984/85 by the end of the year. In the future, Cameroon will need to rely increasingly on non-ICO markets, if it is to avoid a major buildup of excess stocks.

Weather conditions were favorable in the Ivory Coast for both the 1984/85 and 1985/86 (October/September) coffee crops. Further, the 1985/86 harvest is expected to be the largest in 5 years aided, in part, by government programs to rejuvenate up to 50,000 hectares of unharvested trees once thought largely unnecessary.

At 4.42 million bags, the 1984/85 Ivorian coffee crop is not believed sufficient for the country to meet its ICO quota for the year. Although the gross quantity of beans harvested would be adequate, the harvest contains a high percentage of low-quality black beans, which must be removed before sale. Based on quality, the crop was distributed about as follows:

| <u>Grade</u> | <u>Percent</u> |
|--------------|----------------|
| 1            | 10             |
| 2            | 37             |
| 3            | 34             |
| 4            | 3              |
| Black beans  | 16             |
| Total        | 100            |

In addition, the 1984/85 crop contained an average 14.6 percent moisture, slightly above the safer and more acceptable 14-percent level. The quality problems are thought to have resulted, at least in part, from the efforts of producers to comply with a government request to harvest as early as possible, so that the Ivory Coast could meet its ICO quota obligations on a more timely basis. Despite the larger coffee crop expected during 1985/86, stock accumulation is not likely.

A major concern of the Ivorian government is the large numbers of overaged, unproductive trees as indicated by the following statistics for 1984/85:

| <u>Age of Trees</u><br>(years) | <u>Percent</u> | <u>Yields</u><br>(Kgs/Ha) |
|--------------------------------|----------------|---------------------------|
| Under 5                        | 7              | 800                       |
| 6 - 10                         | 7              | 600                       |
| 11 - 15                        | 22             | 400                       |
| 16 - 25                        | 35             | 150                       |
| Over 25                        | 29             | 80                        |

Favorable weather and a larger number of harvestable trees could result in a 1985/86 (October/September) Kenyan coffee crop of 1.8 million bags. Timely and adequate rains resulted in good flowering and tree recovery from the 1983/84 drought. Arable land is very limited in Kenya. For this reason the government, through its Coffee Improvement Program (CIP), is moving toward the greater use of fertilizers and chemicals for disease and insect control as well as plant materials, which are more disease resistant and higher yielding. In contrast to Tanzania and Cameroon, Kenya has banned the interplanting of food crops with coffee, in order to obtain higher yields.

Kenya hopes to export about 1.53 million bags of coffee during 1984/85, including more than 130,000 bags to non-quota markets. With a record crop in prospect for 1985/86, Kenya must seek a higher quota for the year from the ICO, or expand its non-ICO market sales substantially, in order to earn the foreign exchange needed to cover sizable grain imports resulting from the 1983/84 drought.

Recently, the Kenya Transport Association signed a new agreement to help facilitate the movement of coffee from Uganda to the port of Mombasa, Kenya, by rail. Some coffee from Zaire, Rwanda, and Burundi also transits Kenya for export from Mombasa.

Most of Tanzania's coffee growing areas suffered from drought or below-normal precipitation during 1983 and 1984, as well as an increased incidence of coffee berry disease (CBD). Losses from the disease are a serious concern as it now affects 70-80 percent of the country's coffee trees. By drawing down on stocks and holding non-member sales to 200,000 bags or less, Tanzania should be able to meet its ICO quota of about 750,000 bags for the 1984/85 coffee year. West Germany and the Netherlands are the leading Tanzanian quota markets; Algeria, which has a special buying arrangement, is the largest non-quota market.

Weather conditions have been favorable for Zaire's 1985/86 (October/September) coffee harvest, which is forecast larger than the 1.5 million bags harvested in 1984/85.

Zairian pricing policies for coffee are currently geared toward encouraging a larger output. The private sector is expected to play a more important role in coffee marketing in the future, leaving international promotion, pricing policies, extension activities, and the ICO to the parastatal OZACAFE. At present, there are about 100 Zairian firms licensed to export coffee.

## ASIA AND OCEANIA

The 1985/86 Indian coffee crop (October/September) is expected to be down from the all-time record 2.33 million bags expected for this year. Although weather conditions were generally good during the past January-April flowering period, the length and distribution of rains from the southwest monsoon, which usually begins in June, will determine the actual size of the 1985/86 crop. Over the long run, production is believed to be on an uptrend as a result of improving cultural practices, the use of newly developed higher yielding varieties, and extensive new plantings in traditional as well as non-traditional areas.

In January 1985, the Coffee Board entered into a new bilateral agreement with the USSR involving the sale of up to 35,000 tons (about 583,000 bags) of 1984/85 crop coffee at a price discount of 40.25 percent from the average for ICO member country coffee. Shipment was scheduled between February and November/December 1985. The discounts for other non-member markets have been set slightly lower.

Although India had substantially undershipped its quarterly quotas for the 1984/85 coffee year as of March 31, 1985, it expects to fill its annual quota by the end of September. Export duties on coffee were reduced from Rs 7,200 per metric ton to Rs. 5,700 per ton (about \$27 per bag as of May 15, 1985).

After expanding for a number of years, Indonesia's coffee production declined in 1984/85 (April/March), the result of untimely rains during the August and September 1984 flowering period. However, based on more normal weather and the higher yields now being obtained, production will rebound in 1985/86 to nearly 5.5 million bags.

The expanded coffee area of the late 1970's is now in full production. Changes in output are now mainly due to weather, the rate at which older trees are being replaced, and management. Despite harvesting a smaller crop, Indonesia was able to increase its exports in 1984/85 by drawing on stocks. In recent years, the United States has emerged as Indonesia's leading coffee market because of the U.S. industry's increasing use of low-priced Robusta in instant coffee manufacture.

Exports to non-ICO markets have increased rapidly and now account for more than half of total Indonesian exports. The recent ICO decision regarding shipments to non-ICO countries may have a major impact on Indonesia's ability to export to non-member countries. Indonesian coffee traders have suggested serious consideration be given to withdrawal from the ICO, since they do not believe adequate non-member markets exist for Indonesian coffee at member country prices.

Coffee production in Malaysia, probably the most important exporting country still outside the ICO, is expected to total 170,000 bags during 1985/86 (October/September), up 10,000 bags from 1984/85. The planted area in West Malaysia has stabilized within the 10,500 to 11,000 hectare range, while the

area in East Malaysia has grown steadily from 4,500 hectares in 1978 to over 11,000 hectares in 1983. With the exception of Sabah, where coffee production has been undertaken by a state-owned rural development agency, coffee remains essentially a smallholder crop of secondary importance to cocoa. Liberica is still the most popular variety of coffee grown on peninsular (West) Malaysia. The dumping of Indonesian Robusta coffee in Malaysia at less than the Malaysian support price resulted in an abnormal buildup stock during 1980-83. Since 1984, the government has controlled the level of such imports through the issuance of licenses. Bean re-exports, mainly from ICO member Singapore, also rose steadily until they too were brought under control in 1984. In that year, Thailand replaced Singapore as the top market for Malaysian coffee.

Papua New Guinea's 1985/86 (July/June) coffee harvest will exceed last year's above average output. While higher international coffee prices have permitted Papua New Guinea to earn more per bag, it has not had the necessary supplies of coffee to take full advantage of the situation. Exports to non-ICO countries have been suspended until March 1986 in order to rebuild stocks. Green coffee exports in calendar 1984 totaled 824,139 bags, of which 74 percent was shipped to ICO markets.

Philippine coffee production declined by over 20 percent during 1984/85 (October/September) because of the 1983 drought and a reduction in fertilizer use. While output will rise somewhat in 1985/86, recovery from the 1983 drought was delayed in certain parts of Mindanao by a follow-up dry spell from the last quarter of 1984 until April 1985.

Philippine coffee is generally classified into three categories: (1) "Cavite" produced in the southern Luzon, regarded as the best quality bean produced in the country, (2) "M-1" beans produced in Mindanao, which are slightly inferior to the "Cavite" beans, and (3) "M-3", beans of lower quality produced in Mindanao, the Visayas, and Bicol. Local processors generally purchase all of the "Cavite" beans for local processing, leaving the lower quality M-1 and M-3 beans for export.

More beans should be available for export during marketing year 1985/86 as a tight money supply situation has forced local processors to cut down on inventories. Domestic coffee supplies are being extended through the use of substitutes in order to lower their price. Only high-income consumers can still afford to buy pure solubles. Despite reduced domestic demand, Philippine exporters will need to concentrate their export sales in ICO countries, if they are to fill the country's annual quota for 1984/85.

Coffee production in Thailand has risen rapidly from 277,000 bags in 1981/82 (October/September) to a forecast of 425,000 bags in 1985/86 in response to attractive farm gate prices. About 95 percent of Thailand's coffee is Robusta, which is grown in the southern part of the country.

Thai exports of coffee, which have risen steadily since 1978, declined marginally in 1984, presumably due to an increase in the quantity of ground coffee smuggled into Malaysia. As a member of the ICO, Thailand shares in the global quota given small suppliers. Local coffee prices were 30 percent higher in 1984, because the government began allocating export quotas based on stock holdings. This policy has been discontinued and local prices have fallen. Exporters are still obligated to ship 1.1 tons of coffee to non-members for every ton of export quota for sale to ICO members.

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Information in this circular was prepared by C. Milton Anderson, Horticultural and Tropical Products Division, FAS/USDA, Washington D.C. 20250. Telephone (202) 447-2252

TABLE 1

COFFEE, GREEN: TOTAL PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1976/77-1980/81, ANNUAL 1981/82-1985/86  
(IN THOUSANDS OF 60 KILO BAGS)

| REGION AND COUNTRY              | AVERAGE<br>1976/77-1980/81 | 1981/82       | 1982/83       | 1983/84       | 1984/85       | 1985/86       |
|---------------------------------|----------------------------|---------------|---------------|---------------|---------------|---------------|
| <b>NORTH AMERICA:</b>           |                            |               |               |               |               |               |
| COSTA RICA.....                 | 1,638                      | 1,742         | 2,300         | 2,070         | 2,570         | 2,100         |
| CUBA.....                       | 315                        | 383           | 300           | 385           | 325           | 375           |
| DOMINICAN REPUBLIC.....         | 918                        | 850           | 1,100         | 810           | 900           | 820           |
| EL SALVADOR.....                | 3,019                      | 2,886         | 3,100         | 2,800         | 3,000         | 2,900         |
| GUATEMALA.....                  | 2,586                      | 2,653         | 2,530         | 2,340         | 2,600         | 2,600         |
| HAITI.....                      | 516                        | 494           | 674           | 660           | 635           | 660           |
| HONDURAS.....                   | 1,052                      | 1,200         | 1,800         | 1,400         | 1,500         | 1,400         |
| JAMAICA.....                    | 22                         | 23            | 30            | 33            | 40            | 40            |
| MEXICO.....                     | 3,643                      | 3,900         | 4,530         | 4,530         | 4,250         | 4,480         |
| NICARAGUA.....                  | 955                        | 950           | 1,257         | 710           | 775           | 800           |
| PANAMA.....                     | 107                        | 120           | 151           | 157           | 188           | 220           |
| TRINIDAD-TOBAGO.....            | 45                         | 44            | 23            | 30            | 30            | 30            |
| UNITED STATES.....              | 196                        | 211           | 267           | 201           | 279           | 239           |
| <b>TOTAL NORTH AMERICA.....</b> | <b>15,612</b>              | <b>15,496</b> | <b>19,062</b> | <b>16,126</b> | <b>17,092</b> | <b>16,664</b> |
| <b>SOUTH AMERICA:</b>           |                            |               |               |               |               |               |
| BOLIVIA.....                    | 124                        | 135           | 155           | 150           | 160           | 150           |
| BRAZIL.....                     | 18,060                     | 33,000        | 17,750        | 30,000        | 27,000        | 33,000        |
| COLOMBIA.....                   | 11,832                     | 14,342        | 13,300        | 13,000        | 12,800        | 12,500        |
| ECUADOR.....                    | 1,518                      | 1,792         | 1,800         | 1,380         | 1,500         | 1,600         |
| GUYANA.....                     | 20                         | 26            | 25            | 25            | 25            | 25            |
| PARAGUAY.....                   | 80                         | 229           | 271           | 280           | 300           | 300           |
| PERU.....                       | 1,112                      | 1,100         | 1,100         | 1,270         | 1,150         | 1,300         |
| VENEZUELA.....                  | 974                        | 1,107         | 791           | 958           | 1,035         | 1,150         |
| <b>TOTAL SOUTH AMERICA.....</b> | <b>33,721</b>              | <b>51,731</b> | <b>35,192</b> | <b>47,063</b> | <b>43,970</b> | <b>50,025</b> |
| <b>AFRICA:</b>                  |                            |               |               |               |               |               |
| ANGOLA.....                     | 678                        | 392           | 330           | 260           | 375           | 350           |
| BENIN.....                      | 13                         | 37            | 50            | 55            | 50            | 50            |
| BURUNDI.....                    | 362                        | 730           | 340           | 593           | 425           | 500           |
| CAMEROON.....                   | 1,586                      | 1,953         | 1,929         | 1,060         | 2,160         | 1,940         |
| CENTRAL AFRICAN REPUBLIC.....   | 194                        | 284           | 316           | 150           | 250           | 300           |
| CONGO, BRAZZAVILLE.....         | 54                         | 36            | 32            | 35            | 40            | 40            |
| EQUATORIAL GUINEA.....          | 11                         | 20            | 20            | 20            | 25            | 25            |
| ETHIOPIA.....                   | 3,104                      | 3,212         | 3,670         | 3,990         | 2,970         | 3,750         |
| GABON.....                      | 6                          | 15            | 29            | 35            | 40            | 40            |
| GHANA.....                      | 39                         | 35            | 23            | 20            | 25            | 25            |
| GUINEA.....                     | 85                         | 64            | 65            | 50            | 60            | 70            |
| IVORY COAST.....                | 4,559                      | 4,160         | 4,510         | 1,420         | 4,420         | 4,700         |
| KENYA.....                      | 1,515                      | 1,489         | 1,541         | 2,160         | 1,536         | 1,800         |
| LIBERIA.....                    | 151                        | 165           | 159           | 80            | 125           | 150           |
| MADAGASCAR.....                 | 1,111                      | 1,305         | 1,000         | 1,300         | 1,200         | 1,250         |
| MALAWI.....                     | 4                          | 10            | 16            | 27            | 35            | 35            |
| NIGERIA.....                    | 50                         | 52            | 45            | 42            | 48            | 50            |
| RWANDA.....                     | 442                        | 502           | 377           | 536           | 500           | 500           |
| SIERRA LEONE.....               | 159                        | 176           | 233           | 180           | 195           | 185           |
| TANZANIA.....                   | 863                        | 959           | 1,033         | 843           | 915           | 930           |
| TOGO.....                       | 142                        | 225           | 284           | 275           | 280           | 280           |
| UGANDA.....                     | 2,142                      | 2,885         | 3,200         | 3,400         | 3,500         | 3,250         |
| ZAIPE (CONGO-K).....            | 1,336                      | 1,425         | 1,354         | 1,350         | 1,503         | 1,540         |
| ZIMBABWE.....                   | 77                         | 52            | 117           | 147           | 180           | 180           |
| <b>TOTAL AFRICA.....</b>        | <b>19,683</b>              | <b>20,213</b> | <b>20,673</b> | <b>19,028</b> | <b>20,847</b> | <b>21,940</b> |
| <b>ASIA:</b>                    |                            |               |               |               |               |               |
| INDIA.....                      | 2,020                      | 2,540         | 2,170         | 1,667         | 2,917         | 2,334         |
| INDONESIA.....                  | 4,465                      | 5,755         | 4,750         | 5,135         | 4,600         | 5,450         |
| MALAYSIA.....                   | 114                        | 141           | 145           | 154           | 160           | 170           |
| PHILIPPINES.....                | 711                        | 1,067         | 1,000         | 779           | 857           | 943           |
| THAILAND.....                   | 140                        | 277           | 327           | 335           | 380           | 425           |
| VIETNAM.....                    | 67                         | 60            | 60            | 60            | 60            | 60            |
| YEMEN, APAS REP.....            | 51                         | 58            | 57            | 50            | 53            | 53            |
| <b>TOTAL ASIA.....</b>          | <b>7,568</b>               | <b>9,929</b>  | <b>8,509</b>  | <b>8,180</b>  | <b>9,027</b>  | <b>9,435</b>  |
| <b>OCEANIA:</b>                 |                            |               |               |               |               |               |
| NEW CALEDONIA.....              | 9                          | 8             | 6             | 4             | 6             | 6             |
| PAPUA NEW GUINEA.....           | 768                        | 680           | 891           | 950           | 900           | 1,000         |
| <b>TOTAL OCEANIA.....</b>       | <b>777</b>                 | <b>688</b>    | <b>897</b>    | <b>954</b>    | <b>906</b>    | <b>1,006</b>  |
| <b>WORLD TOTAL.....</b>         | <b>75,761</b>              | <b>98,056</b> | <b>83,333</b> | <b>90,351</b> | <b>91,842</b> | <b>99,070</b> |

1/ Coffee marketing year begins about October in some countries and April or July in others. 2/ 132.276 pounds.

NOTE: Production estimates for some countries include cross-border movements.

SOURCE: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

TABLE 2

COFFEE, GREEN: EXPORTABLE PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1976/77-1980/81, ANNUAL 1981/82-1985/86  
(IN THOUSANDS OF 60 KILO BAGS)

| REGION AND COUNTRY              | AVERAGE<br>1976/77-1980/81 | 1981/82       | 1982/83       | 1983/84       | 1984/85       | 1985/86       |
|---------------------------------|----------------------------|---------------|---------------|---------------|---------------|---------------|
| <b>NORTH AMERICA:</b>           |                            |               |               |               |               |               |
| COSTA RICA.....                 | 1,437                      | 1,539         | 2,077         | 1,837         | 2,335         | 1,865         |
| CUBA.....                       | --                         | --            | --            | 35            | 25            | 50            |
| DOMINICAN REPUBLIC.....         | 644                        | 555           | 800           | 508           | 595           | 513           |
| EL SALVADOR.....                | 2,825                      | 2,686         | 2,900         | 2,600         | 2,800         | 2,700         |
| GUATEMALA.....                  | 2,277                      | 2,328         | 2,195         | 2,000         | 2,260         | 2,260         |
| HAITI.....                      | 298                        | 264           | 434           | 415           | 385           | 410           |
| HONDURAS.....                   | 943                        | 1,080         | 1,676         | 1,270         | 1,362         | 1,254         |
| JAMAICA.....                    | 11                         | 11            | 18            | 21            | 27            | 27            |
| MEXICO.....                     | 2,294                      | 2,450         | 2,830         | 2,830         | 2,530         | 2,710         |
| NICARAGUA.....                  | 873                        | 855           | 1,157         | 610           | 695           | 715           |
| PANAMA.....                     | 41                         | 52            | 85            | 89            | 118           | 150           |
| TRINIDAD-TOBAGO.....            | 28                         | 26            | 3             | 10            | 9             | 8             |
| UNITED STATES.....              | --                         | --            | --            | --            | --            | --            |
| <b>TOTAL NORTH AMERICA.....</b> | <b>11,672</b>              | <b>11,846</b> | <b>14,175</b> | <b>12,225</b> | <b>13,141</b> | <b>12,662</b> |
| <b>SOUTH AMERICA:</b>           |                            |               |               |               |               |               |
| BOLIVIA.....                    | 92                         | 100           | 119           | 115           | 123           | 112           |
| BRAZIL.....                     | 10,260                     | 24,500        | 9,750         | 21,500        | 18,500        | 24,000        |
| COLOMBIA.....                   | 10,201                     | 12,492        | 11,445        | 11,140        | 10,935        | 10,630        |
| ECUADOR.....                    | 1,317                      | 1,562         | 1,560         | 1,135         | 1,240         | 1,329         |
| GUYANA.....                     | 1                          | 3             | 3             | 3             | 3             | 3             |
| PARAGUAY.....                   | 59                         | 207           | 248           | 257           | 277           | 275           |
| PERU.....                       | 864                        | 842           | 840           | 1,045         | 940           | 1,100         |
| VENEZUELA.....                  | 123                        | 81            | --            | 153           | 226           | 50            |
| <b>TOTAL SOUTH AMERICA.....</b> | <b>22,918</b>              | <b>39,787</b> | <b>23,965</b> | <b>35,348</b> | <b>32,244</b> | <b>37,499</b> |
| <b>AFRICA:</b>                  |                            |               |               |               |               |               |
| ANGOLA.....                     | 633                        | 350           | 287           | 216           | 330           | 304           |
| BENIN.....                      | 12                         | 36            | 49            | 54            | 49            | 49            |
| BURUNDI.....                    | 361                        | 729           | 337           | 592           | 424           | 499           |
| CAMEROON.....                   | 1,557                      | 1,918         | 1,884         | 1,005         | 2,105         | 1,885         |
| CENTRAL AFRICAN REPUBLIC.....   | 180                        | 266           | 298           | 137           | 235           | 283           |
| CONGO, BRAZZAVILLE.....         | 53                         | 35            | 31            | 34            | 39            | 39            |
| EQUATORIAL GUINEA.....          | --                         | 5             | 5             | 10            | 15            | 15            |
| ETHIOPIA.....                   | 1,411                      | 1,596         | 2,108         | 2,355         | 1,370         | 2,100         |
| GABON.....                      | 5                          | 14            | 28            | 34            | 39            | 39            |
| GHANA.....                      | 29                         | 26            | 15            | 12            | 17            | 18            |
| GUINEA.....                     | 79                         | 58            | 59            | 44            | 54            | 64            |
| IVORY COAST.....                | 4,496                      | 4,095         | 4,445         | 1,031         | 3,903         | 4,154         |
| KENYA.....                      | 1,462                      | 1,434         | 1,501         | 2,116         | 1,486         | 1,740         |
| LIBERIA.....                    | 145                        | 159           | 153           | 74            | 118           | 143           |
| MADAGASCAR.....                 | 962                        | 1,132         | 823           | 1,120         | 1,017         | 1,061         |
| MALAWI.....                     | 4                          | 10            | 16            | 27            | 35            | 35            |
| NIGERIA 3/.....                 | --                         | --            | --            | --            | --            | --            |
| RUWANDA.....                    | 440                        | 500           | 376           | 535           | 499           | 499           |
| SIERRA LEONE.....               | 154                        | 171           | 228           | 174           | 179           | 179           |
| TANZANIA.....                   | 843                        | 939           | 1,013         | 823           | 895           | 910           |
| TOGO.....                       | 141                        | 224           | 293           | 274           | 279           | 279           |
| UGANDA.....                     | 2,103                      | 2,840         | 3,154         | 3,353         | 3,452         | 3,200         |
| ZAIRE (CONGO-K).....            | 1,166                      | 1,240         | 1,159         | 1,135         | 1,268         | 1,290         |
| ZIMBABWE.....                   | 69                         | 72            | 107           | 139           | 171           | 170           |
| <b>TOTAL AFRICA.....</b>        | <b>16,305</b>              | <b>17,849</b> | <b>18,359</b> | <b>15,294</b> | <b>17,979</b> | <b>18,955</b> |
| <b>ASIA:</b>                    |                            |               |               |               |               |               |
| INDIA.....                      | 1,161                      | 1,599         | 1,167         | 698           | 1,917         | 1,284         |
| INDONESIA.....                  | 3,389                      | 4,630         | 3,636         | 4,010         | 3,640         | 4,350         |
| MALAYSIA 3/.....                | 5                          | --            | --            | --            | --            | --            |
| PHILIPPINES.....                | 345                        | 572           | 490           | 229           | 472           | 543           |
| THAILAND.....                   | 36                         | 151           | 188           | 192           | 235           | 275           |
| VIETNAM.....                    | 33                         | 25            | 25            | 25            | 25            | 25            |
| YEMEN, ARAB REP.....            | 41                         | 48            | 47            | 40            | 43            | 43            |
| <b>TOTAL ASIA.....</b>          | <b>5,010</b>               | <b>7,025</b>  | <b>5,553</b>  | <b>5,194</b>  | <b>6,332</b>  | <b>6,520</b>  |
| <b>OCEANIA:</b>                 |                            |               |               |               |               |               |
| NEW CALEDONIA.....              | --                         | --            | --            | --            | --            | --            |
| PAPUA NEW GUINEA.....           | 755                        | 664           | 874           | 933           | 883           | 983           |
| <b>TOTAL OCEANIA.....</b>       | <b>755</b>                 | <b>664</b>    | <b>874</b>    | <b>933</b>    | <b>883</b>    | <b>983</b>    |
| <b>WORLD TOTAL.....</b>         | <b>56,660</b>              | <b>77,171</b> | <b>62,926</b> | <b>68,994</b> | <b>70,579</b> | <b>76,619</b> |

1/ Coffee marketing year begins about October in some countries and April or July in others. Exportable production represents total harvested production minus estimated domestic consumption. 2/ 132,276 pounds. 3/ Coffee producing countries which import more coffee than they export are not regarded as having exportable production.

NOTE: Production estimates for some countries include cross-border movements.

SOURCE: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source material, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

TABLE 3

## WORLD COFFEE SUPPLY AND DISTRIBUTION, 1961-1986

(IN 1,000 60-KG BAGS)

| COUNTRY BY TIME PERIOD            | BEGINNING STOCKS | PRODUCTION | IMPORTS 1/ | TOTAL SUPPLY | DOMESTIC USE | EXPORTS |           |         | ENDING STOCKS |        |
|-----------------------------------|------------------|------------|------------|--------------|--------------|---------|-----------|---------|---------------|--------|
|                                   |                  |            |            |              |              | BEANS   | RSTD/GRND | SOLUBLE |               |        |
| WORLD TOTAL                       |                  |            |            |              |              |         |           |         |               |        |
| 1961/62.....                      | 65,124           | 75,968     | 279        | 141,371      | 21,079       | 45,972  | 56        | 135     | 46,163        | 74,129 |
| 1962/63.....                      | 74,129           | 67,791     | 256        | 142,176      | 14,690       | 46,782  | 42        | 123     | 46,947        | 80,539 |
| 1963/64.....                      | 80,539           | 65,338     | 183        | 146,060      | 17,614       | 50,886  | 69        | 118     | 51,074        | 77,372 |
| 1964/65.....                      | 77,372           | 52,654     | 177        | 130,203      | 16,741       | 41,769  | 58        | 78      | 41,905        | 71,557 |
| 1965/66.....                      | 71,557           | 82,157     | 249        | 153,963      | 17,809       | 49,670  | 37        | 257     | 49,964        | 86,190 |
| 1966/67.....                      | 86,190           | 63,386     | 279        | 149,855      | 19,252       | 48,328  | 26        | 564     | 48,918        | 81,686 |
| 1967/68.....                      | 81,686           | 71,144     | 273        | 153,103      | 18,067       | 54,724  | 55        | 741     | 55,521        | 79,516 |
| 1968/69.....                      | 79,516           | 63,288     | 228        | 143,032      | 19,636       | 52,548  | 76        | 963     | 53,587        | 69,810 |
| 1969/70.....                      | 69,810           | 69,626     | 267        | 139,703      | 18,887       | 53,865  | 83        | 1,161   | 55,109        | 65,707 |
| 1970/71.....                      | 65,707           | 59,426     | 505        | 125,638      | 19,368       | 50,555  | 112       | 1,253   | 51,920        | 54,351 |
| 1971/72.....                      | 54,351           | 73,316     | 524        | 128,191      | 19,053       | 56,651  | 249       | 1,589   | 58,489        | 50,648 |
| 1972/73.....                      | 50,648           | 77,198     | 497        | 128,343      | 17,449       | 59,016  | 346       | 2,040   | 61,402        | 49,492 |
| 1973/74.....                      | 49,492           | 65,732     | 563        | 115,787      | 19,011       | 58,301  | 192       | 2,149   | 60,642        | 36,133 |
| 1974/75.....                      | 36,133           | 82,785     | 464        | 119,382      | 19,164       | 53,260  | 235       | 1,985   | 55,480        | 44,738 |
| 1975/76.....                      | 44,738           | 73,109     | 410        | 118,257      | 19,177       | 57,151  | 371       | 2,164   | 59,687        | 39,394 |
| 1976/77.....                      | 39,394           | 60,907     | 529        | 100,830      | 18,400       | 54,191  | 351       | 2,176   | 56,718        | 25,712 |
| 1977/78.....                      | 25,712           | 70,808     | 613        | 97,133       | 18,764       | 47,759  | 183       | 897     | 48,839        | 29,530 |
| 1978/79.....                      | 29,530           | 78,900     | 729        | 109,159      | 19,466       | 61,917  | 222       | 2,433   | 64,572        | 25,121 |
| 1979/80.....                      | 25,121           | 81,853     | 690        | 107,664      | 19,973       | 59,233  | 217       | 2,573   | 62,023        | 25,668 |
| 1980/81.....                      | 25,668           | 86,338     | 653        | 112,659      | 20,600       | 56,839  | 166       | 2,821   | 59,826        | 32,233 |
| 1981/82.....                      | 32,233           | 98,056     | 769        | 131,058      | 21,232       | 60,569  | 223       | 4,059   | 64,851        | 44,975 |
| 1982/83.....                      | 44,975           | 83,333     | 790        | 129,098      | 20,676       | 62,257  | 202       | 2,488   | 64,947        | 43,475 |
| 1983/84.....                      | 43,475           | 90,351     | 779        | 134,605      | 21,654       | 64,972  | 337       | 2,772   | 68,081        | 44,870 |
| 1984/85.....                      | 44,870           | 91,842     | 611        | 137,323      | 21,494       | 67,202  | 282       | 3,310   | 70,794        | 45,035 |
| 1985/86.....                      | 45,035           | 99,070     | 608        | 144,713      | 22,689       | 67,074  | 270       | 2,873   | 70,217        | 51,807 |
| / Imports by exporting countries. |                  |            |            |              |              |         |           |         |               |        |

1/ Imports by exporting countries.

NOTE: TOTAL MAY NOT ADD BECAUSE OF ROUNDING, -- DENOTES UNAVAILABLE, NEGLIGIBLE, OR ZERO

JULY 1985

HORTICULTURAL AND TROPICAL PRODUCTS DIVISION  
COMMODITY PROGRAMS, FAS, USDA

TABLE 4

WORLD: COFFEE SUPPLY & DISTRIBUTION 1985/86  
(in thousands of 60 kilogram bags)

| Country                       | Beginning Stocks | Production    | Imports    | Total S/D      | Domestic Use  | Exports       | Ending Stocks |
|-------------------------------|------------------|---------------|------------|----------------|---------------|---------------|---------------|
| Costa Rica.....               | 1,264            | 2,100         | ---        | 3,364          | 235           | 1,802         | 1,327         |
| Cuba.....                     | ---              | 375           | 200        | 575            | 325           | 250           | ---           |
| Dominican Republic.....       | 540              | 820           | ---        | 1,360          | 307           | 550           | 503           |
| El Salvador.....              | 1,607            | 2,900         | ---        | 4,507          | 200           | 2,800         | 1,507         |
| Guatemala.....                | 170              | 2,600         | ---        | 2,770          | 340           | 2,100         | 330           |
| Haiti.....                    | 25               | 660           | ---        | 685            | 250           | 420           | 15            |
| Honduras.....                 | 952              | 1,400         | ---        | 2,352          | 146           | 1,300         | 906           |
| Jamaica.....                  | 9                | 40            | 2          | 51             | 13            | 30            | 8             |
| Mexico.....                   | -775             | 4,480         | ---        | 5,255          | 1,770         | 2,650         | 835           |
| Nicaragua.....                | 50               | 800           | ---        | 850            | 85            | 725           | 40            |
| Panama.....                   | 70               | 220           | ---        | 290            | 70            | 80            | 140           |
| Trinidad & Tobago.....        | 7                | 30            | 6          | 43             | 22            | 15            | 6             |
| United States.....            | 120              | 239           | 65         | 424            | 320           | ---           | 104           |
| <b>Total.....</b>             | <b>5,589</b>     | <b>16,664</b> | <b>273</b> | <b>22,526</b>  | <b>4,083</b>  | <b>12,722</b> | <b>574</b>    |
| Bolivia.....                  | 32               | 150           | ---        | 182            | 38            | 120           | 24            |
| Brazil.....                   | 7,714            | 33,000        | ---        | 40,714         | 9,000         | 19,000        | 12,714        |
| Colombia.....                 | 13,921           | 12,500        | ---        | 26,421         | 1,870         | 10,000        | 14,551        |
| Ecuador.....                  | 633              | 1,600         | ---        | 2,233          | 271           | 1,500         | 462           |
| Guyana.....                   | ---              | 25            | ---        | 25             | 22            | 3             | ---           |
| Paraguay.....                 | 194              | 300           | ---        | 494            | 25            | 260           | 209           |
| Peru.....                     | 520              | 1,300         | ---        | 1,820          | 200           | 1,000         | 620           |
| Venezuela.....                | 392              | 1,150         | ---        | 1,542          | 1,100         | 125           | 317           |
| <b>Total.....</b>             | <b>23,406</b>    | <b>50,025</b> | <b>---</b> | <b>73,431</b>  | <b>12,526</b> | <b>32,008</b> | <b>28,897</b> |
| Angola.....                   | 803              | 350           | ---        | 1,153          | 46            | 300           | 807           |
| Benin.....                    | ---              | 50            | ---        | 50             | ---           | 49            | ---           |
| Burundi.....                  | 104              | 500           | ---        | 604            | 1             | 500           | 103           |
| Cameroon.....                 | 1,148            | 1,940         | 10         | 3,098          | 55            | 1,950         | 1,093         |
| Central African Republic..... | 6                | 300           | ---        | 306            | 17            | 280           | 9             |
| Congo.....                    | 7                | 40            | ---        | 47             | 1             | 37            | 9             |
| Equatorial Guinea.....        | ---              | 25            | ---        | 25             | 10            | 15            | ---           |
| Ethiopia.....                 | 2,580            | 3,750         | ---        | 6,330          | 1,650         | 1,650         | 3,030         |
| Gabon.....                    | ---              | 40            | ---        | 40             | 1             | 39            | ---           |
| Ghana.....                    | 22               | 25            | ---        | 47             | 7             | 25            | 15            |
| Guinea.....                   | 17               | 70            | ---        | 87             | 6             | 56            | 25            |
| Ivory Coast.....              | ---              | 4,700         | ---        | 4,700          | 546 1/        | 4,154         | ---           |
| Kenya.....                    | 1,366            | 1,800         | ---        | 3,166          | 60            | 1,600         | 1,506         |
| Liberia.....                  | 8                | 150           | 5          | 163            | 7             | 141           | 15            |
| Madagascar.....               | 991              | 1,250         | ---        | 2,241          | 189           | 900           | 1,152         |
| Malawi.....                   | 14               | 35            | ---        | 49             | ---           | 30            | 19            |
| Nigeria.....                  | 16               | 50            | 90         | 156            | 132           | 12            | 12            |
| Rwanda.....                   | 84               | 500           | ---        | 584            | 1             | 500           | 83            |
| Sierra Leone.....             | 5                | 185           | ---        | 190            | 6             | 180           | 4             |
| Tanzania.....                 | 283              | 930           | ---        | 1,213          | 20            | 985           | 208           |
| Togo.....                     | 14               | 280           | ---        | 294            | 1             | 280           | 13            |
| Uganda.....                   | 4,558            | 3250          | ---        | 7,808          | 50            | 2,600         | 5,158         |
| Zaire.....                    | 1,018            | 1,540         | ---        | 2,558          | 250           | 1,240         | 1,068         |
| Zimbabwe.....                 | 29               | 180           | ---        | 209            | 10            | 162           | 37            |
| <b>Total.....</b>             | <b>13,093</b>    | <b>21,940</b> | <b>105</b> | <b>35,138</b>  | <b>3,067</b>  | <b>17,695</b> | <b>14,376</b> |
| India.....                    | 943              | 2,334         | ---        | 3,227          | 1,050         | 1,500         | 727           |
| Indonesia.....                | 1,027            | 5,450         | ---        | 6,477          | 1,100         | 4,500         | 877           |
| Malaysia.....                 | 18               | 170           | 227        | 415            | 245           | 138           | 32            |
| Philippines.....              | 413              | 943           | ---        | 1,356          | 400           | 509           | 447           |
| Thailand.....                 | 112              | 425           | 3          | 540            | 150           | 247           | 143           |
| Vietnam.....                  | ---              | 60            | ---        | 60             | 35            | 25            | ---           |
| Yemen Arab Republic.....      | ---              | 53            | ---        | 53             | 10            | 43            | ---           |
| <b>Total.....</b>             | <b>2,513</b>     | <b>9,435</b>  | <b>230</b> | <b>12,178</b>  | <b>2,990</b>  | <b>6,962</b>  | <b>2,226</b>  |
| New Caledonia.....            | ---              | 6             | ---        | 6              | 6             | ---           | ---           |
| Papua New Guinea.....         | 434              | 1,000         | ---        | 1,434          | 17            | 830           | 587           |
| <b>Total.....</b>             | <b>434</b>       | <b>1,006</b>  | <b>---</b> | <b>1,440</b>   | <b>23</b>     | <b>830</b>    | <b>587</b>    |
| <b>World Total.....</b>       | <b>45,035</b>    | <b>99,070</b> | <b>608</b> | <b>144,713</b> | <b>22,689</b> | <b>70,217</b> | <b>51,807</b> |

1/ Includes low quality bean which have been or will be destroyed.

TABLE 5  
U.S. IMPORTS OF COFFEE BY TYPES: CALENDAR YEARS 1983 AND 1984  
(In 60 kilogram bags, green bean equivalent)

|                             | Green      | Roasted/<br>Ground | Soluble   | Total      | Green      | Roasted/<br>Ground | Soluble   | Total      |
|-----------------------------|------------|--------------------|-----------|------------|------------|--------------------|-----------|------------|
| <b>COLOMBIAN MILDS</b>      |            |                    |           |            |            |                    |           |            |
| Colombia.....               | 1,754,634  | 4,783              | 67,226    | 1,826,643  | 2,170,380  | 33                 | 61,662    | 2,232,075  |
| Kenya.....                  | 263,154    | 4                  | —         | 263,158    | 171,478    | 5                  | —         | 171,483    |
| Tanzania.....               | 13,303     | 6                  | —         | 13,309     | 9,144      | —                  | 433       | 9,577      |
| Total.....                  | 2,031,091  | 4,793              | 67,226    | 2,103,110  | 2,351,002  | 38                 | 62,095    | 2,413,135  |
| <b>OTHER MILDS</b>          |            |                    |           |            |            |                    |           |            |
| Burundi.....                | 17,632     | —                  | —         | 17,632     | 8,729      | —                  | —         | 8,729      |
| Costa Rica.....             | 226,202    | —                  | —         | 226,202    | 258,329    | 18,249             | —         | 276,578    |
| Dominican Republic..        | 430,049    | 804                | —         | 430,853    | 447,041    | 520                | 3,618     | 451,179    |
| Ecuador.....                | 856,600    | 485                | 96,626    | 953,711    | 961,133    | 50                 | 103,582   | 1,064,765  |
| El Salvador.....            | 1,213,951  | 734                | 24,101    | 1,238,786  | 1,051,744  | 90                 | 13,680    | 1,065,514  |
| Guatemala.....              | 387,169    | 1,661              | 1,294     | 390,124    | 1,119,134  | 713                | 2,001     | 1,120,848  |
| Haiti.....                  | 128,425    | —                  | —         | 128,425    | 105,322    | 2                  | —         | 105,324    |
| Honduras.....               | 253,377    | —                  | —         | 253,377    | 285,285    | 809                | —         | 286,094    |
| India.....                  | 158,108    | —                  | —         | 158,108    | 153,382    | 2,168              | —         | 155,550    |
| Jamaica.....                | 1,073      | 414                | 7         | 1,494      | 707        | 605                | 14        | 1,326      |
| Malawi.....                 | —          | —                  | —         | —          | 250        | —                  | —         | 250        |
| Mexico.....                 | 1,494,876  | 137,677            | 12,023    | 1,644,576  | 1,553,461  | 175,423            | 1,741     | 1,730,625  |
| Nicaragua.....              | 5,778      | 7                  | 6,377     | 12,662     | 31,943     | —                  | —         | 31,943     |
| Panama.....                 | 58,338     | —                  | —         | 58,338     | 61,780     | —                  | —         | 61,780     |
| Papua New Guinea....        | 38,736     | —                  | —         | 38,736     | 65,136     | —                  | —         | 65,136     |
| Peru.....                   | 439,176    | 1,036              | 3,312     | 444,024    | 556,993    | 342                | 264       | 557,599    |
| Rwanda.....                 | 163,978    | —                  | 2,250     | 166,228    | 68,084     | —                  | —         | 68,084     |
| Venezuela.....              | 25,763     | 397                | —         | 26,160     | 87,831     | 2,880              | —         | 90,711     |
| Zimbabwe.....               | 25,461     | —                  | —         | 25,461     | 22,000     | —                  | —         | 22,000     |
| Total.....                  | 6,430,192  | 143,215            | 146,990   | 6,720,397  | 6,837,284  | 201,851            | 124,900   | 7,164,035  |
| <b>UNWASHED ARABICAS</b>    |            |                    |           |            |            |                    |           |            |
| Bolivia.....                | 15,443     | —                  | —         | 15,443     | 5,668      | —                  | —         | 5,668      |
| Brazil.....                 | 3,417,488  | 32,315             | 894,980   | 4,344,783  | 3,865,701  | 48,678             | 826,181   | 4,740,560  |
| Ethiopia.....               | 518,660    | —                  | —         | 518,660    | 423,295    | 1                  | 260       | 423,556    |
| Paraguay.....               | 131,597    | —                  | —         | 131,597    | 122,957    | —                  | —         | 122,957    |
| Total.....                  | 4,083,188  | 32,315             | 894,980   | 5,010,483  | 4,417,621  | 48,679             | 826,441   | 5,292,741  |
| <b>ROBUSTAS</b>             |            |                    |           |            |            |                    |           |            |
| Angola.....                 | 26,796     | —                  | —         | 26,796     | 4,992      | —                  | —         | 4,992      |
| Cameroon.....               | 156,930    | —                  | —         | 156,930    | 80,997     | 15                 | —         | 81,012     |
| Central Afr. Rep....        | —          | —                  | —         | —          | 5,589      | —                  | —         | 5,589      |
| Guinea.....                 | 44,920     | —                  | —         | 44,920     | 12,102     | —                  | —         | 12,102     |
| Indonesia.....              | 1,079,029  | 5,010              | —         | 1,084,039  | 1,030,232  | 9,775              | —         | 1,040,007  |
| Ivory Coast.....            | 673,548    | —                  | —         | 673,548    | 1,143,536  | —                  | —         | 1,143,536  |
| Liberia.....                | 38,889     | —                  | —         | 38,889     | 19,415     | —                  | —         | 19,415     |
| Madagascar.....             | 125,998    | 5                  | —         | 126,003    | 83,573     | —                  | —         | 83,573     |
| Malaysia.....               | 17,057     | —                  | —         | 17,057     | 650        | 8                  | —         | 658        |
| Nigeria.....                | —          | —                  | —         | —          | 4,603      | —                  | —         | 4,603      |
| Philippines.....            | 276,438    | 404                | —         | 276,842    | 295,916    | 1,309              | —         | 297,225    |
| Sierra Leone.....           | 104,986    | —                  | —         | 104,986    | 139,754    | —                  | —         | 139,754    |
| Sri Lanka.....              | 32,619     | —                  | —         | 32,619     | 5,696      | —                  | —         | 5,696      |
| Thailand.....               | 111,306    | 3                  | 14        | 111,323    | 84,138     | 4                  | —         | 84,142     |
| Togo.....                   | 133,174    | —                  | —         | 133,174    | 199,686    | —                  | —         | 199,686    |
| Trinidad & Tobago...        | 5,603      | —                  | —         | 5,603      | 4,035      | —                  | —         | 4,035      |
| Uganda.....                 | 728,984    | —                  | —         | 728,984    | 569,927    | —                  | —         | 569,927    |
| Zaire.....                  | 22,181     | 3                  | —         | 22,184     | 12,403     | 29                 | —         | 12,432     |
| Total.....                  | 3,578,458  | 5,425              | 14        | 3,583,897  | 3,697,244  | 11,140             | —         | 3,708,384  |
| <b>OTHER COUNTRIES.....</b> |            |                    |           |            |            |                    |           |            |
|                             | 325,639    | 11,669             | 66,372    | 403,680    | 430,450    | 22,685             | 61,139    | 514,274    |
| World Total.....            | 16,448,568 | 197,417            | 1,175,582 | 17,821,567 | 17,733,601 | 284,393            | 1,074,575 | 19,092,569 |

1/ Mainly non-producing countries in Western Europe.

SOURCE: USDA

April 1985

TABLE 6  
COFFEE YEAR 1984/85  
ANNUAL QUOTAS REFLECTING QUOTA INCREASE WITHDRAWAL OF JULY 4, 1985  
(in bags of 60 kilos)

| Exporting Member          | Revised Annual Quota | Exporting Members                  | Revised Annual Quota |
|---------------------------|----------------------|------------------------------------|----------------------|
| <u>TOTAL</u>              | <u>59,155,500</u>    | <u>Brazil &amp; Other Arabicas</u> | <u>18,227,724</u>    |
| A. Sub-total: Members     |                      | Brazil                             | <u>16,777,729</u>    |
| entitled to a basic quota |                      | Ethiopia                           | 1,449,995            |
| Colombian Milds           |                      | Robustas                           | 14,192,902           |
| Colombia                  | <u>10,950,831</u>    | Angola                             | <u>270,000</u>       |
| Kenya                     | <u>8,858,421</u>     | Indonesia                          | 2,501,843            |
| Tanzania                  | <u>1,351,005</u>     | OAMCAF                             | (7,237,551)          |
|                           | <u>741,405</u>       | Benin                              | 55,529               |
| Other Milds               |                      | Cameroon                           | 1,488,303            |
| Costa Rica                | <u>12,849,221</u>    | Central African Republic           | <u>281,160</u>       |
| Dominican Republic        | <u>1,220,265</u>     | Congo                              | 42,211               |
| Ecuador                   | 516,238              | Gabon                              | 42,211               |
| El Salvador               | <u>1,180,756</u>     | Ivory Coast                        | 4,217,773            |
| Guatemala                 | <u>2,438,400</u>     | Madagascar                         | 801,817              |
| Honduras                  | <u>1,889,211</u>     | Togo                               | 308,547              |
| India                     | 857,800              | Philippines                        | 488,778              |
| Mexico                    | <u>700,503</u>       | Uganda                             | 2,516,432            |
| Nicaragua                 | <u>1,988,065</u>     | Zaire                              | 1,178,298            |
| Papua New Guinea          | <u>697,470</u>       |                                    |                      |
| Peru                      | <u>646,567</u>       |                                    |                      |
|                           | <u>713,946</u>       |                                    |                      |
|                           |                      | B. Sub-total: Members              | 2,934,822            |
|                           |                      | exempt from basic quotas           |                      |

SOURCE: ICO

TABLE 7

EXPORTS BY EXPORTING MEMBERS TO MEMBERS AND NON-MEMBERS  
APRIL-MARCH 1982/83 TO 1984/85  
(000 Bags)

|   | MEMBERS |         |         | NON-MEMBERS |         |         |
|---|---------|---------|---------|-------------|---------|---------|
|   | 1982/83 | 1983/84 | 1984/85 | 1982/83     | 1983/84 | 1984/85 |
|   | (4)     | (5)     | (6)     | (4)         | (5)     | (6)     |
| <b>TOTAL</b>  | 54,459  | 56,408  | 58,720* | 9,902       | 10,420  | 11,048* |
| <b>SUB-TOTAL: MEMBERS<br/>ENTITLED TO BASIC QUOTA</b> | 52,181  | 53,659  | 56,149  | 9,469       | 10,234  | 10,853  |
| <b>COLOMBIAN MILOS</b>                                | 9,824   | 10,731  | 11,645  | 1,465       | 1,032   | 1,156   |
| Colombia.....   | 7,973   | 8,622   | 9,427   | 871         | 782     | 901     |
| Kenya.....  | 1,257   | 1,321   | 1,398   | 312         | 104     | 213     |
| Tanzania.....   | 594     | 788     | 820     | 282         | 146     | 42      |
| <b>OTHER MILOS</b>                                    | 11,837  | 12,590  | 12,913  | 3,483       | 4,348   | 3,972   |
| Costa Rica.....                                       | 1,141   | 1,162   | 1,236   | 501         | 659     | 767     |
| Dominican Republic.....                               | 519     | 525     | 521     | 15          | ---     | 32      |
| Ecuador.....  | 1,040   | 1,153   | 1,186   | 563         | 167     | 133 1/  |
| El Salvador.....                                      | 2,188   | 2,423   | 2,516   | 0           | 668     | 159     |
| Guatemala.....  | 1,796   | 1,913   | 1,865   | 616         | 50      | 576     |
| Honduras.....   | 766     | 803     | 849     | 202         | 363     | 425     |
| India.....  | 781     | 701     | 715     | 618         | 495     | 420     |
| Mexico.....   | 1,734   | 2,058   | 1,924   | 584         | 930     | 1,053   |
| Nicaragua.....  | 625     | 550     | 790     | 228         | 416     | 16      |
| Papua New Guinea.....                                 | 585     | 588     | 615     | 119         | 289     | 180     |
| Peru.....   | 662     | 714     | 695     | 38          | 310     | 210     |
| <b>BRAZILIAN &amp; OTHER ARABICAS</b>                 | 16,788  | 17,176  | 18,288  | 1,715       | 2,177   | 2,965   |
| Brazil.....   | 15,457  | 15,714  | 17,193  | 1,596       | 2,035   | 2,722   |
| Ethiopia.....   | 1,330   | 1,462   | 1,095   | 118         | 142     | 183     |
| <b>ROBUSTAS</b>                                       | 13,733  | 13,162  | 13,304  | 2,806       | 2,678   | 2,743   |
| Angola.....   | 371     | 194     | 170     | 249         | 246     | 200     |
| Indonesia.....  | 2,308   | 2,456   | 2,604   | 1,536       | 1,939   | 2,406   |
| QAMICAF.....  | (6,640) | (6,729) | (6,346) | (930)       | (489)   | (119)   |
| Benin.....  | 36      | 54      | 21      | 0           | 0       | 0       |
| Cameroon.....   | 1,364   | 1,472   | 1,440   | 162         | 171     | 5       |
| Central African Rep.....                              | 280     | 265     | 226     | 0           | 0       | 0       |
| Congo.....  | 33      | 42      | 24 1/   | 0           | 0       | 0 1/    |
| Gabon.....  | 30      | 34      | 16      | 0           | 0       | 0       |
| Ivory Coast.....                                      | 3,856   | 3,785   | 3,514   | 673         | 219     | 113     |
| Madagascar.....                                       | 707     | 777     | 904     | 94          | 98      | 2       |
| Togo.....   | 334     | 300     | 219     | 0           | 0       | 0       |
| Philippines.....                                      | 424     | 419     | 568     | 2           | 3       | 1       |
| Uganda.....   | 2,895   | 2,333   | 2,350   | 73          | 0       | 17      |
| Zaire.....  | 1,094   | 1,032   | 1,248   | 16          | 2       | 0       |
| <b>SUB-TOTAL: MEMBERS<br/>EXEMPT FROM BASIC QUOTA</b> | 2,278   | 2,749   | 2,570   | 433         | 185     | 213     |
| <b>ARABICAS</b>                                       | 1,785   | 2,006   | 2,097   | 360         | 175     | 114     |
| Bolivia.....  | 106     | 115     | 98      | 10          | 5       | 0       |
| Burundi.....  | 415     | 456     | 540 1/  | 35          | 0       | 0 1/    |
| Cuba.....   | 105     | 105     | 76      | 132         | 102     | 19      |
| Haiti.....  | 463     | 368     | 377     | 0           | 0       | ---     |
| Jamaica.....  | 18      | 20      | 22 1/   | 0           | 0       | ---     |
| Malawi.....   | 17      | 19      | 30 1/   | 0           | 0       | 0 1/    |
| Panama.....   | 79      | 71      | 91      | 0           | 0       | 3       |
| Paraguay.....   | 106     | 163     | 128     | 88          | 52      | 41      |
| Rwanda.....   | 378     | 507     | 535     | 82          | ---     | 0 1/    |
| Venezuela.....  | 4       | 88      | 78      | 0           | 0       | 0       |
| Zambia.....   | 0       | 0       | 0       | 0           | 0       | 0       |
| Zimbabwe.....   | 94      | 94      | 121     | 11          | 15      | 51      |
| <b>ROBUSTAS</b>                                       | 493     | 744     | 474     | 73          | 10      | 98      |
| Equatorial Guinea.....                                | ---     | 9       | 12      | ---         | 0       | 0       |
| Ghana.....  | 19      | 8       | 8       | 0           | 0       | 0       |
| Guinea.....   | 35      | 61      | 0       | 3           | 3       | 0       |
| Liberia.....  | 141     | 130     | 102     | 17          | 0       | 0       |
| Nigeria.....  | 52      | 36      | 25 1/   | 0           | 0       | 0 1/    |
| Sierra Leone.....                                     | 108     | 272     | 132 1/  | 0           | 0       | 0 1/    |
| Sri Lanka.....  | 45      | 73      | 62      | 0           | 0       | 0       |
| Thailand.....   | 74      | 145     | 133     | 46          | 2       | 98      |
| Trinidad & Tobago.....                                | 19      | 9       | 1 1/    | 7           | 5       | 1 1/    |
| <b>BRAZIL</b>   | 15,457  | 15,714  | 17,193  | 1,596       | 2,035   | 2,722   |
| <b>COLOMBIA</b>                                       | 79,673  | 8,622   | 9,427   | 871         | 782     | 901     |
| <b>ALL OTHER ARABICAS</b>                             | 16,803  | 18,166  | 18,322  | 4,556       | 4,915   | 4,524   |
| <b>ROBUSTAS</b>                                       | 14,226  | 13,906  | 13,777  | 2,879       | 2,688   | 2,841   |

1/ Includes estimates for March 1985.

- Less than 500 bags. \* Preliminary.

A blank denotes that the information was not provided by the member. Due to rounding the totals may not always reflect the sum of the relevant components

SOURCE: ICO document EB 2569/85 May 16, 1985

April 1985

**TABLE 8**  
EXPORTS BY EXPORTING MEMBERS TO ALL MEMBERS  
OCTOBER 1984 TO MARCH 1985  
(60 Kg. Bags)

| Exporting Member                                  | Current quota:     |                    | Difference col. (2)-(1) | Difference column (3) as % col (2) |
|---|--------------------|--------------------|-------------------------|------------------------------------|
|   | Oct.-March 1984/85 | Oct.-March 1984/85 |                         |                                    |
|   | (1)                | (2)                | (3)                     | (4)                                |
| <b>TOTAL</b>                                      | 26,790,120*        | 30,447,580         | 3,657,460               | 12                                 |
| <b>SUB-TOTAL: MEMBERS ENTITLED TO BASIC QUOTA</b> | 25,594,953         | 28,881,740         | 3,286,787               | 11                                 |
| <b>COLOMBIAN MILOS</b>                            | 5,688,009          | 5,663,707          | -24,302                 | -                                  |
| Colombia.....                                     | 4,579,693          | 4,581,525          | 1,832                   | --                                 |
| Kenya.....  | 691,373            | 698,732            | 7,359                   | 1                                  |
| Tanzania.....                                     | 416,943            | 383,450            | -33,493                 | -9                                 |
| <b>OTHER MILOS</b>                                | 5,968,946          | 6,643,308          | 674,362                 | 10                                 |
| Costa Rica.....                                   | 598,947            | 630,340            | 31,393                  | 5                                  |
| Dominican Republic.....                           | 254,587            | 266,995            | 12,408                  | 5                                  |
| Ecuador.....                                      | 538,943            | 610,680            | 71,737                  | 12                                 |
| El Salvador.....                                  | 1,257,309          | 1,261,126          | 3,817                   | -                                  |
| Guatemala.....                                    | 890,920            | 977,089            | 86,169                  | 9                                  |
| Honduras.....                                     | 421,712            | 442,876            | 21,164                  | 5                                  |
| India.....  | 314,855            | 361,866            | 47,011                  | 13                                 |
| Mexico.....                                       | 898,570            | 1,028,216          | 129,646                 | 13                                 |
| Nicaragua.....                                    | 286,339            | 360,728            | 74,389                  | 21                                 |
| Papua New Guinea.....                             | 195,486            | 334,143            | 138,657                 | 41                                 |
| Peru.....   | 311,278            | 369,249            | 57,971                  | 16                                 |
| <b>BRAZILIAN &amp; OTHER ARABICAS</b>             | 8,074,480          | 9,428,344          | 1,353,864               | 14                                 |
| Brazil.....                                       | 7,741,671          | 8,677,346          | 935,675                 | 11                                 |
| Ethiopia.....                                     | 332,809            | 750,998            | 418,189                 | 56                                 |
| <b>ROBUSTAS</b>                                   | 5,863,518          | 7,146,381          | 1,282,863               | 18                                 |
| Angola.....                                       | 73,500             | 190,000 1/         | 116,500                 | 61                                 |
| Indonesia.....                                    | 1,231,752          | 1,248,409          | 16,657                  | 1                                  |
| OAMCAF.....                                       | (2,638,967)        | (3,611,434) 2/     | (972,467)               | (27)                               |
| Benin.....  | 0                  | 27,708             | 27,708                  | 100                                |
| Cameroon.....                                     | 632,159            | 742,642            | 110,483                 | 15                                 |
| Central African Rep.....                          | 50,640             | 140,294            | 89,654                  | 64                                 |
| Congo.....  | 504                | 21,063             | 20,559                  | 98                                 |
| Gabon.....  | 2,134              | 21,063             | 18,929                  | 90                                 |
| Ivory Coast.....                                  | 1,495,791          | 2,104,608          | 608,817                 | 29                                 |
| Madagascar.....                                   | 396,717            | 400,095            | 3,378                   | 1                                  |
| Togo.....   | 61,022             | 153,961            | 92,939                  | 60                                 |
| Philippines.....                                  | 252,977            | 252,794            | -183                    | -                                  |
| Uganda.....                                       | 1,075,001          | 1,255,765          | 180,764                 | 14                                 |
| Zaire.....  | 591,321            | 587,979            | -3,342                  | -1                                 |
| <b>SUB-TOTAL: MEMBERS EXEMPT FROM BASIC QUOTA</b> | 1,195,167          | 1,565,840          | 370,673                 | 24                                 |
| <b>ARABICAS</b>                                   | 1,040,636          | 1,155,004          | 114,368                 | 10                                 |
| Bolivia.....                                      | 17,500             | 57,672             | 40,172                  | 70                                 |
| Burundi.....                                      | 234,953            | 235,000            | 47                      | -                                  |
| Cuba 3/.....                                      | 75,619             | 80,730             | 5,111                   | 6                                  |
| Haiti.....  | 209,523            | 210,504            | 981                     | -                                  |
| Jamaica.....                                      | 5,718              | 6,582 4/           | 864                     | 13                                 |
| Malawi.....                                       | 11,681             | 16,143 4/          | 4,462                   | 28                                 |
| Panama.....                                       | 76,792             | 79,207 4/          | 2,415                   | 3                                  |
| Paraguay.....                                     | 43,703             | 62,171             | 18,468                  | 30                                 |
| Rwanda.....                                       | 229,193            | 235,000 4/         | 5,807                   | 2                                  |
| Venezuela.....                                    | 49,704             | 75,000 4/          | 25,296                  | 34                                 |
| Zambia.....                                       | 0                  | 5,000 4/           | 5,000                   | 100                                |
| Zimbabwe.....                                     | 86,250             | 91,995 4/          | 5,745                   | 6                                  |
| <b>ROBUSTAS</b>                                   | 154,531            | 410,836            | 256,305                 | 62                                 |
| Equatorial Guinea.....                            | 0                  | 15,000 4/          | 15,000                  | 100                                |
| Ghana.....  | 1,698              | 13,227 4/          | 11,529                  | 87                                 |
| Guinea.....                                       | 0                  | 52,658             | 52,658                  | 100                                |
| Liberia.....                                      | 45,536             | 68,455             | 22,919                  | 33                                 |
| Nigeria.....                                      | 7,050              | 19,245 4/          | 12,195                  | 63                                 |
| Sierra Leone.....                                 | 5,194              | 123,244            | 118,050                 | 96                                 |
| Sri Lanka.....                                    | 35,026             | 50,003 4/          | 14,977                  | 30                                 |
| Thailand.....                                     | 60,027             | 60,040             | 13                      | -                                  |
| Trinidad & Tobago.....                            | 0                  | 8,964              | 8,964                   | 100                                |
| <b>BRAZIL</b>                                     | 7,741,671          | 8,677,364          | 935,675                 | 11                                 |
| <b>COLOMBIA</b>                                   | 4,579,693          | 4,581,525          | 1,832                   | --                                 |
| <b>ALL OTHER ARABICAS</b>                         | 8,450,707          | 9,631,492          | 1,180,785               | 12                                 |
| <b>ROBUSTAS</b>                                   | 6,018,049          | 7,557,217          | 1,539,168               | 20                                 |

\* Preliminary

1/ Does not take into account the shortfall of 80,000 bags declared by Angola on January 5, 1985. The shortfall will be deducted from the quota in the quarter April-June 1985. 2/ As a member group OAMCAF has a single quota. The figures shown for the quotas of the individual members correspond to the share of the group quota allocated to them by OAMCAF and are given here for general information. 3/ Acceded to the Agreement on February 19, 1985. 4/ Exporting member with an annual quota of less than 100,000 bags and as a consequence, in accordance with the provisions of paragraph (5) of Article 31, not subject to quarterly quotas. The amount shown corresponds to the amount of coffee exports stamps released.

TABLE 9

UNIT VALUE OF EXPORTS OF ALL FORMS OF COFFEE  
 BY ALL EXPORTING MEMBERS TO MEMBERS AND TO NON-MEMBERS  
 BY QUARTER IN COFFEE YEARS 1980/81 TO 1984/85

(US cents per lb)

| Coffee year | Quarter    | Exports to<br>Member<br>countries | Index<br>(Oct.-Dec.<br>1980=100) | Exports to<br>non-member<br>countries | Index<br>(Oct.-Dec.)<br>1980=100) | Col. (3) as<br>percentage<br>of col. (1) |
|-------------|------------|-----------------------------------|----------------------------------|---------------------------------------|-----------------------------------|--|
|             |            | (1)                               | (2)                              | (3)                                   | (4)                               | (5)                                      |
| 1980/81     | Oct.-Dec.  | 117.34                            | 100                              | 118.75                                | 100                               | 101.20                                   |
|             | Jan.-March | 110.93                            | 95                               | 113.06                                | 95                                | 101.92                                   |
|             | April-June | 106.81                            | 91                               | 104.58                                | 88                                | 97.91                                    |
|             | July-Sept. | 91.76                             | 78                               | 90.19                                 | 76                                | 98.29                                    |
| 1981/82     | Oct.-Dec.  | 96.96                             | 83                               | 82.52                                 | 69                                | 85.11                                    |
|             | Jan.-March | 110.24                            | 94                               | 86.93                                 | 73                                | 78.86                                    |
|             | April-June | 112.62                            | 96                               | 92.28                                 | 78                                | 81.94                                    |
|             | July-Sept. | 106.64                            | 91                               | 81.24                                 | 68                                | 76.18                                    |
| 1982/83     | Oct.-Dec.  | 109.24                            | 93                               | 69.14                                 | 58                                | 63.29                                    |
|             | Jan.-March | 112.42                            | 96                               | 74.24                                 | 63                                | 66.04                                    |
|             | April-June | 108.61                            | 93                               | 67.39                                 | 57                                | 62.05                                    |
|             | July-Sept. | 111.10                            | 95                               | 75.78                                 | 64                                | 68.21                                    |
| 1983/84     | Oct.-Dec.  | 117.13                            | 100                              | 64.15                                 | 54                                | 54.77                                    |
|             | Jan.-March | 126.78                            | 108                              | 66.85                                 | 56                                | 52.73                                    |
|             | April-June | 127.87                            | 109                              | 77.24                                 | 65                                | 60.41                                    |
|             | July-Sept. | 125.93                            | 107                              | 81.40                                 | 69                                | 64.64                                    |
| 1984/85     | Oct.-Dec.  | 121.00                            | 103                              | 74.44                                 | 63                                | 61.52                                    |
|             | Jan.-March |                                   |                                  |                                       |                                   |  |

SOURCE: ICO document EB 2382/84 (E) Rev. 6 April 1, 1985

July 1985

Horticultural and Tropical Products Division, USDA/FAS

TABLE 10  
1985 ICO COMPOSITE DAILY PRICE (1979 AGREEMENT)  
U.S. COFFEE PRICES, 15 DAY AVERAGE

| Daily   |        |        |        |        |        |        |         |        |        |        |        |        | 15-Day Moving Average |         |        |        |       |       |     |      |
|---------|--------|--------|--------|--------|--------|--------|---------|--------|--------|--------|--------|--------|-----------------------|---------|--------|--------|-------|-------|-----|------|
| Day     | Jan.   | Feb    | March  | April  | May    | June   | Day     | Jan.   | Feb    | March  | April  | May    | June                  | Day     | Jan.   | Feb    | March | April | May | June |
| 1.....  | ---    | 137.07 | 130.09 | 133.96 | 132.97 | ---    | 1.....  | ---    | 136.46 | 131.85 | 133.11 | 131.59 | ---                   | 1.....  | 133.17 | 131.65 | ---   | ---   | --- | ---  |
| 2.....  | 133.74 | ---    | ---    | 133.69 | 132.56 | ---    | 2.....  | 133.64 | ---    | ---    | 133.17 | 131.65 | ---                   | 2.....  | 133.25 | 131.71 | ---   | ---   | --- | ---  |
| 3.....  | 133.67 | ---    | ---    | 133.23 | 132.42 | 131.74 | 3.....  | 133.68 | ---    | ---    | 133.33 | ---    | 131.85                | 3.....  | ---    | ---    | ---   | ---   | --- | ---  |
| 4.....  | 133.48 | 137.73 | 130.46 | 132.93 | ---    | 130.08 | 4.....  | 133.66 | 136.70 | 131.58 | 133.33 | ---    | 131.79                | 4.....  | ---    | ---    | ---   | ---   | --- | ---  |
| 5.....  | ---    | 137.36 | 130.15 | ---    | ---    | 130.95 | 5.....  | ---    | 136.89 | 131.32 | ---    | ---    | 131.72                | 5.....  | ---    | ---    | ---   | ---   | --- | ---  |
| 6.....  | ---    | 136.88 | 130.47 | ---    | 132.01 | 130.74 | 6.....  | ---    | 137.03 | 131.11 | ---    | ---    | 131.64                | 6.....  | ---    | ---    | ---   | ---   | --- | ---  |
| 7.....  | 133.44 | 136.09 | 131.15 | ---    | 131.24 | 133.69 | 7.....  | 133.60 | 137.07 | 131.00 | ---    | 131.82 | 131.77                | 7.....  | ---    | ---    | ---   | ---   | --- | ---  |
| 8.....  | 133.69 | 134.54 | 132.01 | 132.74 | 130.62 | ---    | 8.....  | 133.60 | 136.92 | 130.95 | 133.41 | 131.85 | ---                   | 8.....  | 133.42 | 132.00 | ---   | ---   | --- | ---  |
| 9.....  | 134.05 | ---    | ---    | 132.48 | 131.36 | ---    | 9.....  | 133.62 | ---    | ---    | 133.38 | 132.12 | ---                   | 9.....  | 133.30 | ---    | ---   | ---   | --- | ---  |
| 10..... | 134.12 | ---    | ---    | 132.44 | 131.94 | 132.43 | 10..... | 133.62 | ---    | ---    | 133.18 | ---    | 131.84                | 10..... | ---    | ---    | ---   | ---   | --- | ---  |
| 11..... | 134.17 | 134.05 | 132.51 | 131.76 | ---    | 131.96 | 11..... | 133.69 | 136.71 | 130.93 | ---    | ---    | 131.80                | 11..... | ---    | ---    | ---   | ---   | --- | ---  |
| 12..... | ---    | 133.64 | 132.72 | 131.41 | ---    | 132.68 | 12..... | ---    | 136.45 | 131.01 | ---    | ---    | 131.84                | 12..... | ---    | ---    | ---   | ---   | --- | ---  |
| 13..... | ---    | 132.73 | 132.12 | ---    | 132.00 | 133.37 | 13..... | ---    | 136.13 | 131.08 | ---    | 132.12 | 131.92                | 13..... | ---    | ---    | ---   | ---   | --- | ---  |
| 14..... | 134.14 | 132.83 | 131.72 | ---    | 131.95 | 133.26 | 14..... | 133.77 | 135.83 | 131.15 | ---    | 132.11 | 131.98                | 14..... | ---    | ---    | ---   | ---   | --- | ---  |
| 15..... | 134.48 | 132.71 | 131.51 | 131.00 | 131.91 | ---    | 15..... | 133.87 | 135.48 | 131.19 | 133.01 | 132.09 | ---                   | 15..... | ---    | ---    | ---   | ---   | --- | ---  |
| 16..... | 134.79 | ---    | ---    | 130.67 | 131.85 | ---    | 16..... | 133.96 | ---    | ---    | 132.77 | 132.04 | ---                   | 16..... | ---    | ---    | ---   | ---   | --- | ---  |
| 17..... | 135.56 | ---    | ---    | 130.09 | 131.74 | 132.30 | 17..... | 134.10 | ---    | ---    | 132.52 | 132.01 | ---                   | 17..... | ---    | ---    | ---   | ---   | --- | ---  |
| 18..... | 136.77 | ---    | 132.34 | 129.10 | ---    | 132.19 | 18..... | 134.28 | ---    | ---    | 132.21 | ---    | 131.99                | 18..... | ---    | ---    | ---   | ---   | --- | ---  |
| 19..... | ---    | 131.63 | 132.96 | 130.15 | ---    | 131.85 | 19..... | ---    | 135.09 | 131.29 | 131.43 | ---    | 132.02                | 19..... | ---    | ---    | ---   | ---   | --- | ---  |
| 20..... | ---    | 131.01 | 133.04 | ---    | 132.19 | 130.43 | 20..... | ---    | 134.72 | 131.54 | ---    | 131.97 | 131.99                | 20..... | ---    | ---    | ---   | ---   | --- | ---  |
| 21..... | 137.14 | 130.65 | 133.21 | ---    | 131.99 | 129.63 | 21..... | 134.48 | 134.38 | 131.76 | ---    | 131.92 | 131.89                | 21..... | ---    | ---    | ---   | ---   | --- | ---  |
| 22..... | 137.59 | 130.93 | 133.53 | 132.06 | 132.16 | ---    | 22..... | 134.72 | 133.99 | 131.99 | 131.85 | 131.86 | ---                   | 22..... | ---    | ---    | ---   | ---   | --- | ---  |
| 23..... | 137.50 | ---    | ---    | 132.08 | 132.37 | ---    | 23..... | 134.97 | ---    | ---    | 131.72 | 131.85 | ---                   | 23..... | ---    | ---    | ---   | ---   | --- | ---  |
| 24..... | 137.34 | ---    | ---    | 132.25 | 132.24 | 128.70 | 24..... | 135.22 | ---    | ---    | 131.63 | 131.84 | 131.68                | 24..... | ---    | ---    | ---   | ---   | --- | ---  |
| 25..... | 137.99 | 130.85 | 134.23 | 132.50 | ---    | 128.39 | 25..... | 135.52 | 133.58 | 132.24 | 131.58 | ---    | 131.50                | 25..... | ---    | ---    | ---   | ---   | --- | ---  |
| 26..... | ---    | 130.92 | 133.95 | 132.23 | ---    | 128.19 | 26..... | ---    | 133.12 | 132.50 | 131.53 | ---    | 131.32                | 26..... | ---    | ---    | ---   | ---   | --- | ---  |
| 27..... | ---    | 131.34 | 133.71 | ---    | ---    | 128.88 | 27..... | ---    | 132.72 | 132.71 | ---    | ---    | 131.20                | 27..... | ---    | ---    | ---   | ---   | --- | ---  |
| 28..... | 137.49 | 129.83 | 133.91 | ---    | 131.72 | 128.40 | 28..... | 135.79 | 132.25 | 132.90 | ---    | 131.82 | 130.84                | 28..... | ---    | ---    | ---   | ---   | --- | ---  |
| 29..... | 136.47 | ---    | 133.72 | 132.76 | 131.35 | ---    | 29..... | 135.97 | ---    | 133.01 | 131.53 | 131.83 | ---                   | 29..... | ---    | ---    | ---   | ---   | --- | ---  |
| 30..... | 135.86 | ---    | ---    | 132.85 | 131.36 | ---    | 30..... | 136.09 | ---    | ---    | 131.56 | 131.88 | ---                   | 30..... | ---    | ---    | ---   | ---   | --- | ---  |
| 31..... | 136.71 | ---    | ---    | ---    | 131.17 | ---    | 31..... | 136.27 | ---    | ---    | ---    | 131.86 | ---                   | 31..... | ---    | ---    | ---   | ---   | --- | ---  |
| Ave...  | 135.46 | 133.30 | 132.36 | 132.02 | 131.87 | 131.04 | Ave...  | 134.46 | 135.34 | 131.64 | 132.54 | 131.85 | 131.73                |         |        |        |       |       |     |      |

Note: Dashes denote weekends and holidays.

July 1985  
FAS/USDA

(3951H)

Horticultural and Tropical Products Division,

May 24, 1985

RESOLUTION NUMBER 336

(Approved at the Third Plenary Meeting, 20 April 1985)

EXPORTS TO NON-MEMBERS

WHEREAS:

The difference in prices at which transactions take place in Member and non-member markets is matter of concern to both exporting and importing Members;

THE INTERNATIONAL COFFEE COUNCIL in accordance with the relevant provisions of the International Coffee Agreement 1983 and in particular paragraph (3) of Article 2 and Articles 29 and 44,

RESOLVES:

1. That exporting Members shall not accept any sales contracts concluded on or after 22 April 1985 for coffee to be exported to non-members at a price which is lower than the applying to coffee with the same specifications sold to a Member country.

2. (a) Exporting Members shall notify the Executive Director not later than 6 May 1985 of the quantity of coffee for which sales contracts have been concluded before 22 April 1985 for exports to non-members countries up to 30 September 1985, indicating the intended final destination of these exports.

(b) Exporting Members shall undertake to limit their exports to non-members in the period 22 April 1985 to 30 September 1985 to a quantity which would ensure compliance with the provisions of paragraph 1 of this Resolution.

3. That in coffee year 1985/86 and in every coffee year up to and including 1988/89 each exporting Member undertakes to limit its exports to non-members to a quantity which would ensure compliance with paragraph 1 of this Resolution and the need to provide sufficient coffee to quota markets. Exporting Members shall notify the Executive Director of the quantities involved.

4. A Special Committee open to Members of the Board under the chairmanship of the Executive Director shall monitor compliance with this Resolution.

5. In fulfilling its task, the Special Committee shall consider all statistical data provided to the Executive Director by exporting Members and any other information it deems appropriate.

6. The Special Committee shall meet at least once a month and shall report regularly to the Executive Board.

7. If the Special Committee has reason to believe that an exporting Member has not complied with the provisions of this Resolution, the Member concerned shall be invited to comment on this matter.

8. If no comments are forthcoming within 14 days or if the Committee is not satisfied with the explanation given by the Member concerned with regard to compliance with this Resolution, the Special Committee shall recommend the adoption of the appropriate penalties which may include a reduction in the annual quota of the Member concerned or, in extreme cases, the application of the provisions of Article 66. If the Special Committee recommends a reduction in the quota of an exporting Member and the Executive Board accepts this recommendation the quantity of coffee stipulated in the recommendation shall be deducted from the quota of that Member for the next ensuing quarter. This quantity of coffee shall be redistributed pro rata among other exporting Members entitled to a basic quota or to other exporting Members exempt from basic quotas as the case may be.

9. The Special Committee shall report to the Council at the commencement of the second regular Session of the Council in each coffee year on the operation of and the compliance with the provisions of this Resolution.

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